

AGENT FIELD GUIDE

DRAFT **TO** DOORSTEP

Open House *Visitor Kit*

Open houses are great prospecting situations. Use this form to gather information for potential new clients, then follow up with a polished, ready-to-send email.

Precision from Contract to Closing

CONTRACTS@DRAFTTODORSTEP.COM · (765) 490-2562 · ALL 50 STATES

1 Open House Visitor Survey

Open houses are great prospecting situations. Use this form to gather information for potential new clients — print a stack for the sign-in table, or read it aloud as a quick conversation while visitors tour the home.

FULL NAME

TODAY'S DATE

PHONE NUMBER

EMAIL ADDRESS

CURRENT ADDRESS

ARE YOU CURRENTLY WORKING WITH A REAL ESTATE AGENT?

☐ Yes ☐ No ☐ Not Sure Yet

ARE YOU LOOKING TO BUY, SELL, OR BOTH?

☐ Buy ☐ Sell ☐ Both ☐ Just Browsing

WHAT'S YOUR TIMEFRAME FOR MOVING?

☐ 0–3 Months ☐ 3–6 Months ☐ 6–12 Months ☐ Just Looking

HAVE YOU BEEN PRE-APPROVED FOR FINANCING?

☐ Yes ☐ No ☐ Paying Cash

PRICE RANGE YOU'RE CONSIDERING

PREFERRED AREAS / NEIGHBORHOODS

WHAT DID YOU LIKE MOST ABOUT THIS HOME? / ADDITIONAL NOTES

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Follow-Up Email Templates

Send the same day while the visit is still fresh. Personalize the bracketed details from the visitor's survey card.

TEMPLATE 01

FOR VISITORS NOT WORKING WITH AN AGENT

SUBJECT *Great Meeting You at [Property Address] Today!*

Hi [Visitor Name],

It was great meeting you at today's open house! I hope you enjoyed touring [Property Address] as much as I enjoyed showing it.

You mentioned you're [looking to buy in the next few months / exploring the [Neighborhood] area / just starting your search] — I'd love to help however is useful, whether that's setting up a search with listings that match what you're looking for, connecting you with a trusted lender, or just answering questions as you get oriented.

No pressure at all — just reply here or call/text anytime.

[Agent Name]

[Brokerage] · [Phone]

TEMPLATE 02

FOR VISITORS ALREADY WORKING WITH AN AGENT

SUBJECT *Thanks for Stopping By [Property Address]*

Hi [Visitor Name],

Thank you for visiting today's open house! I hope [Property Address] gave you a good sense of what's available in the area.

I understand you're already working with an agent — wishing you the best of luck with your search. If anything ever changes or you'd like a second opinion down the road, I'm always happy to help.

[Agent Name]

[Brokerage] · [Phone]

TEMPLATE 03

FOR NEIGHBORS / SELLERS-IN-WAITING

SUBJECT *Thinking About the Value of Your Own Home?*

Hi [Visitor Name],

Thanks for stopping by [Property Address] today! Since you mentioned you live nearby, I wanted to reach out — homes in [Neighborhood] have been [selling quickly / seeing strong demand] lately.

If you're ever curious what your own home could sell for in today's market, I'm happy to put together a free, no-obligation valuation. Just let me know.

[Agent Name]

[Brokerage] · [Phone]

Tip: Log every visitor into your CRM the same day, even the "just looking" ones — today's browser is often next quarter's client.